

american *CAMP* association®

Camper Enrollment Report 2017

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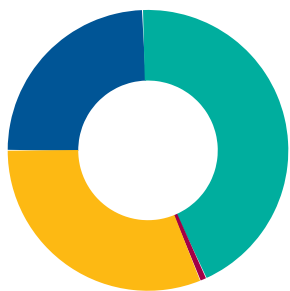
Background

Each year the American Camp Association (ACA) collects enrollment data and trends from camps who respond voluntarily to an online survey. Because this survey was voluntary, it represents the experiences of those who responded to the survey. However, it does provide insight into enrollment trends that might affect the camp industry as a whole. Additional resources can be found on the ACA website under the "Research" tab. Articles on enrollment appear each March/April in the *Camping Magazine*.

Camp Demographics

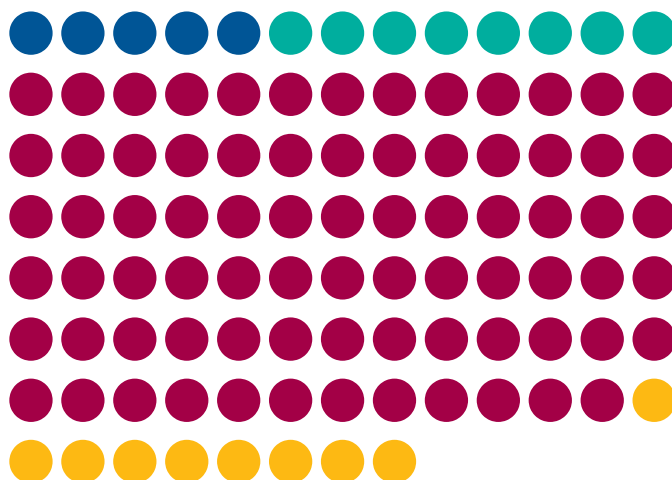
295 Camps Responded

Type of Program

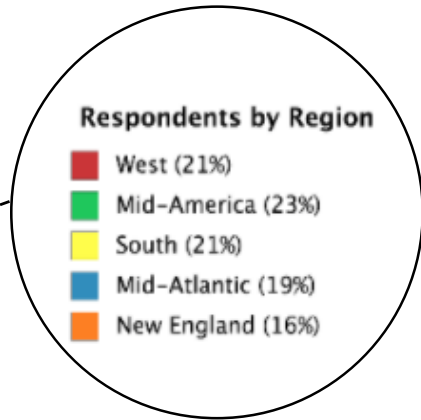
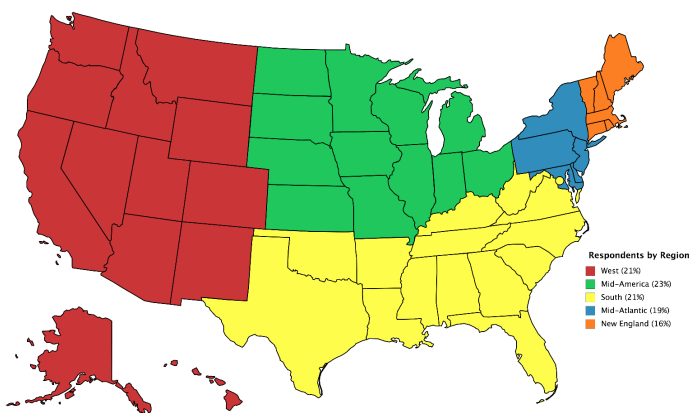


■ Day (24.38%)
 ■ Overnight (43.82%)
■ Rental (0.71%)
 ■ Combination (31.10%)

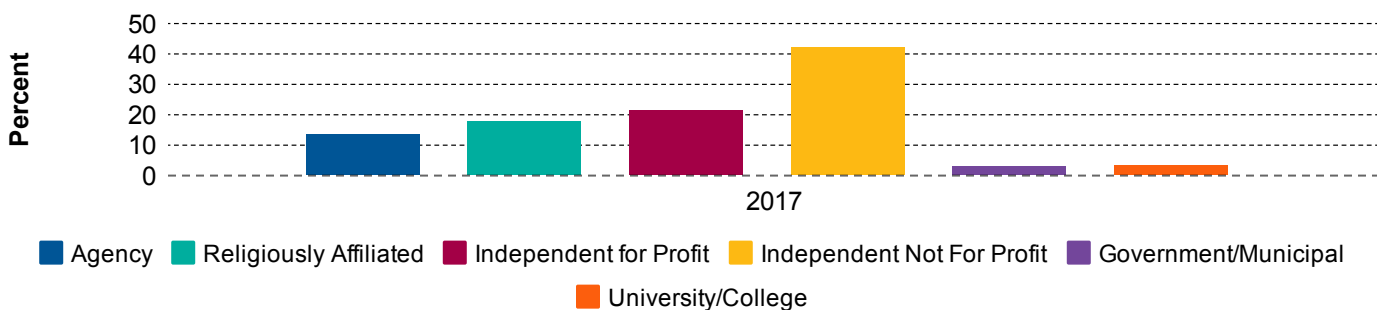
Clientele



■ Boys Only (4.95%)
 ■ Girls Only (8.48%)
■ Coed (77.38%)
 ■ Combo (single gender sessions) (9.19%)

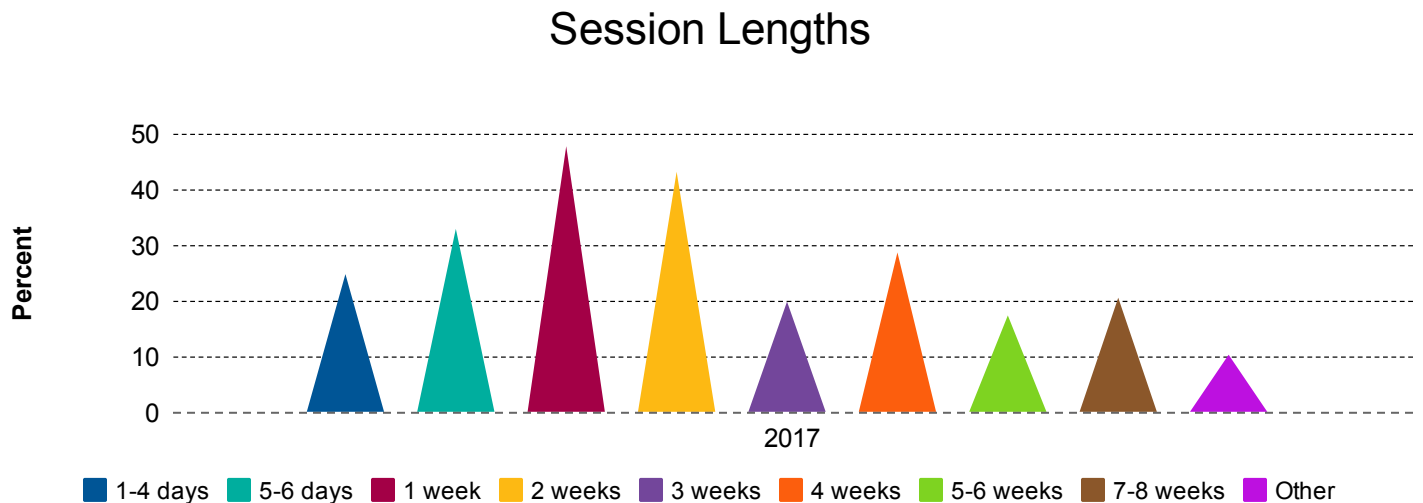


Camp Affiliation

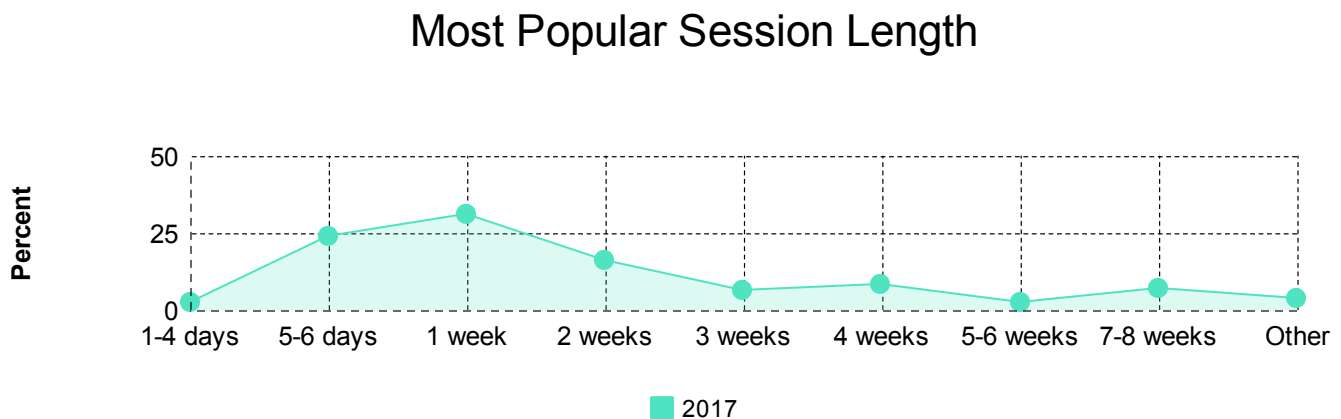


Camp Demographics: Sessions Offered

Nearly 40% of overnight camps report their most popular sessions are between 2-4 weeks long!



Independent for profit camps saw the most even distribution across most popular sessions, with 2 weeks being the most popular session reported

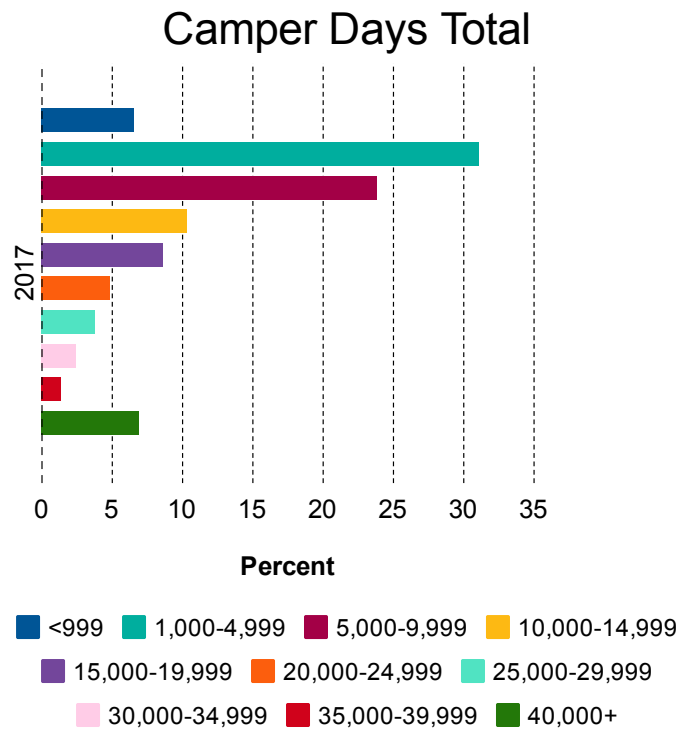
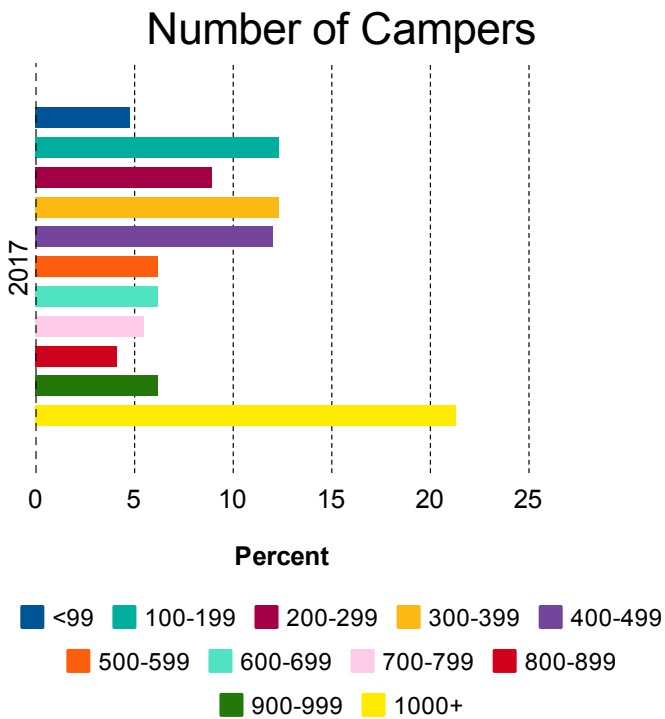


Camp Demographics: Takeaway Points

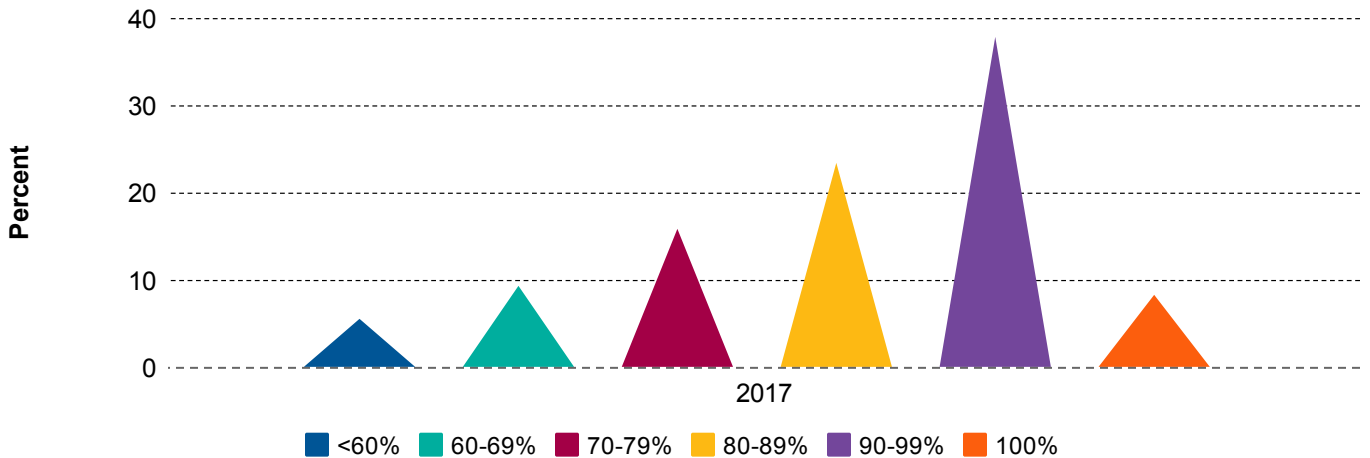
- A total of 295 camp professionals responded to the survey
- 75 of respondents offered overnight camp sessions
- 77% of respondents offered co-ed sessions
- Respondents were fairly evenly distributed across all 5 ACA regions
- 63% of respondents were from independent camps (both for profit and not for profit)
- Nearly half (47%) of camps offer 1 week sessions and 1/4 offer sessions between 1-4 days in length
- One and two week sessions were most popular



Enrollment Data



Capacity

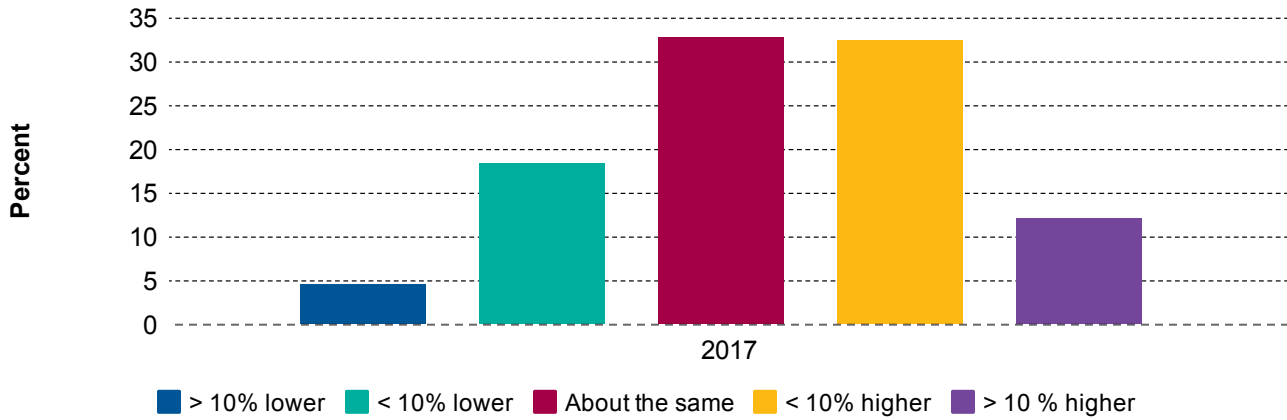


More overnight camps report reaching 100% capacity (14%) as compared to day camps (4%)

Rental only camps report filling to no more than 69% capacity this year

Enrollment Data

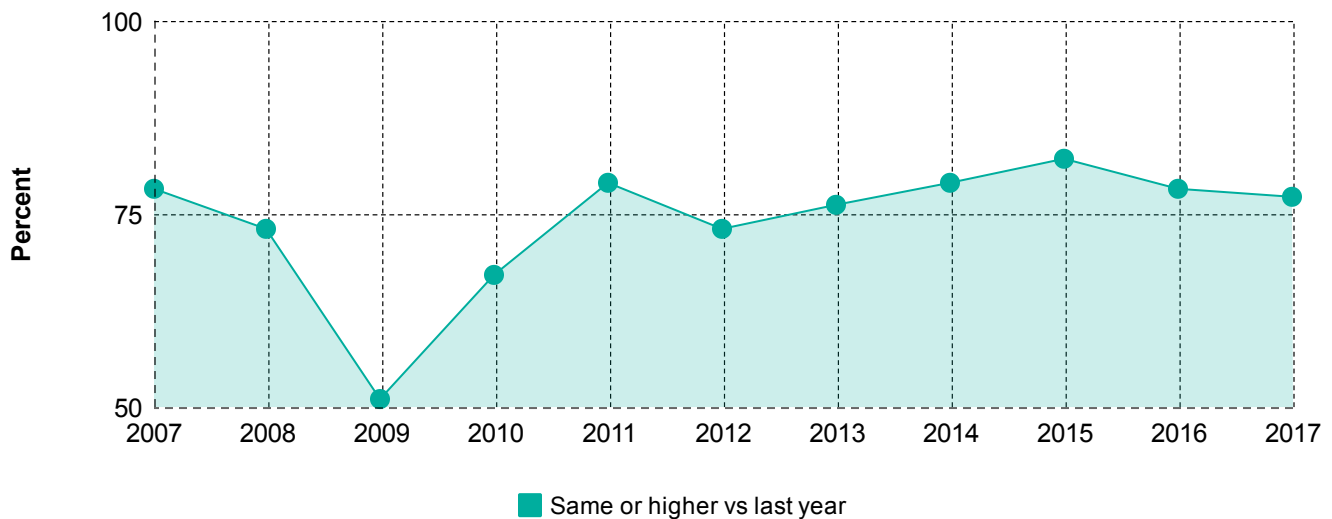
Enrollment 2017 vs. 2016



More overnight camps reported significantly higher enrollment this year (11%) as compared to day camps (9%)

More day camps reported significantly lower enrollment this year (10%) as compared to overnight camps (4%)

Ten Year Enrollment Trend



Enrollment Data: Local Office and Regional Information

- Most popular session — everyone said 1 week except:
 NY/NJ camps was 7-8 weeks
 Virginias and Illinois camps said 2 weeks
 West (40%) said 5-6 days
- Capacity — everyone said 80-99% capacity except:
 Keystone region (36.4% of camps) 70-79% capacity
- Enrollment — everyone was the same or higher vs. 2016, except:
 NY/NJ (34.5% of camps) reported somewhat lower (<10% lower)
 33% of Mid-Atlantic camps reported somewhat higher (<10% higher) and
 33% reported somewhat lower (<10 lower)

Summer 2017 Capacity	<60%	60-69%	70-79%	80-89%	>90%
Agency	2.7%	5.4%	16.2%	21.6%	54.1%
Religiously Affiliated	12.5%	18.8%	25%	20.9%	22.9%
Independent For-Profit	5.1%	1.7%	17%	20.3%	55.9%
Independent Not-For-Profit	4.3%	11%	10.2%	24.6%	50%
Governmental/Municipal	12.5%	0%	0%	37.5%	50%
University/College	0%	0%	33.3%	22.2%	44.4%

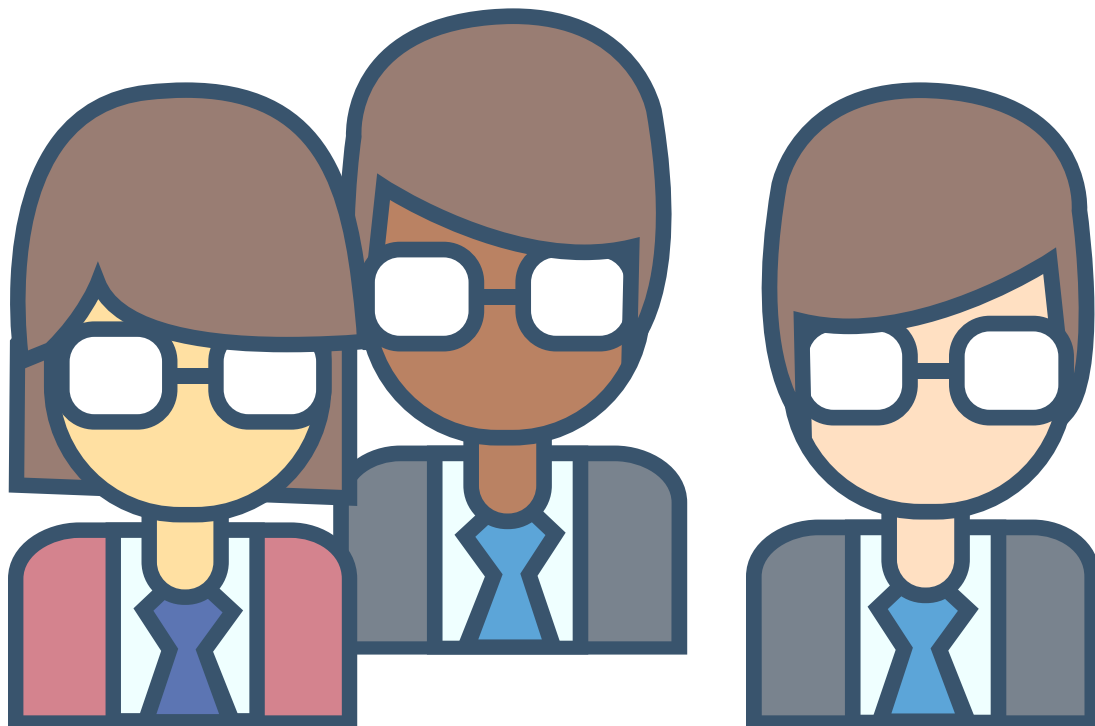
- The highest proportion of camps that serve over 1000 campers was reported by University/College camps (44%)
- The same percentage of IFP and INFP camps (10.2%) reported 100% capacity
- Independent For-Profit camps had the highest proportion of camps (approx. 56%) that reported filling to at least 90% capacity
- It seems Religiously Affiliated and Governmental/Municipal camps had a challenging summer for enrollment (12.5% reported filling to less than 60% capacity)

* Chart affiliations may equal more than 100% due to rounding errors

Enrollment Data: Camp Affiliations

- The highest proportion of camps that serve over 1000 campers was reported by University/College camps (44%)
- INFP camps saw the greatest increase in enrollment with approx. 17% reporting significantly higher enrollment vs. 2016
- Government/Municipal camps saw the greatest decrease in enrollment with 12.5% reported significantly lower enrollment vs. 2016

Summer 2017 Enrollment Changes	Significantly lower than last year (>10% lower)	Somewhat lower than last year (<10% lower)	About the same as last year	Somewhat higher than last year (<10% higher)	Significantly higher than last year (>10% higher)
Agency	2.7%	16.2%	35.1%	16.2%	13.3%
Religiously Affiliated	4.2%	29.2%	25%	33.3%	8.3%
Independent For-Profit	6.8%	18.6%	28.8%	40.7%	5.1%
Independent Not-For-Profit	4.3%	13.7%	36.8%	28.2%	17.1%
Governmental/Municipal	12.5%	12.5%	50%	12.5%	12.5%
University/College	0%	11.1%	44.4%	44.4%	0%



* Chart affiliations may equal more than 100% due to rounding errors

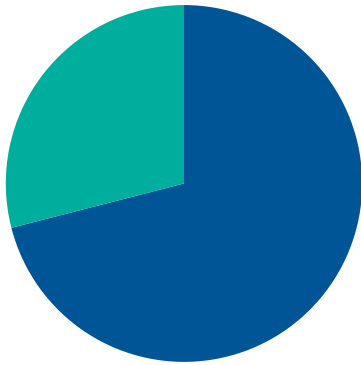
Enrollment Data: Takeaway Points

- Approximately 5% of camps reported a small camp population (<99 campers), while 21% serve over 1,000 campers a summer
- 8% of camps were 100% full this summer and 61% of camps were 80-99% full
- 44% of camps felt enrollment was higher than last summer
- Compared to last summer's enrollment, 77% of camps felt it was the same or higher
- This is similar to the recent trend: in 2016, 78% of camps felt this way
- Indicates a positive trend in camp enrollment overall - more kids are coming to camp!



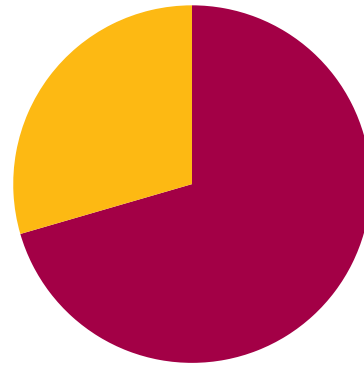
Camper Demographics: Ethnicity

71% of Overnight Camps Report...



■ Campers who are white (71%)
■ Campers who are not white (29%)

70.5% of Day Camps Report...



■ Campers who are white (70.50%)
■ Campers who are not white (29.50%)

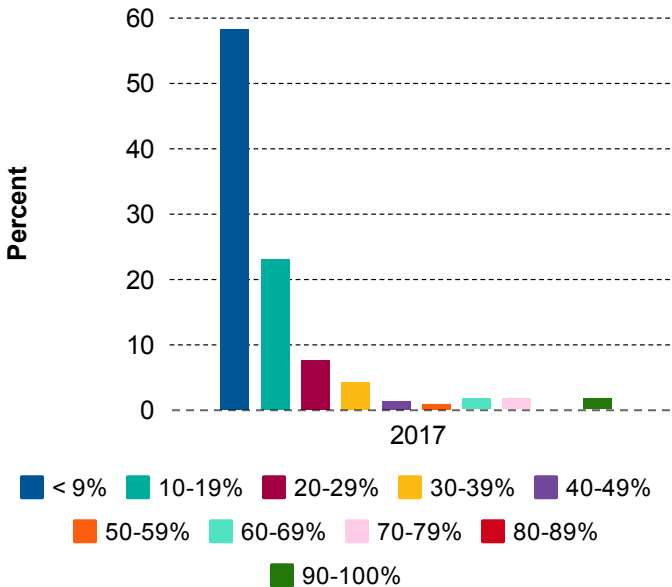
Nearly 30% of day and overnight campers are Black/African American, Hispanic/Latino(a), Asian, Multi-Racial, or other non-white races/ethnicities

Camper Demographics: Ethnicity and Camp Affiliation

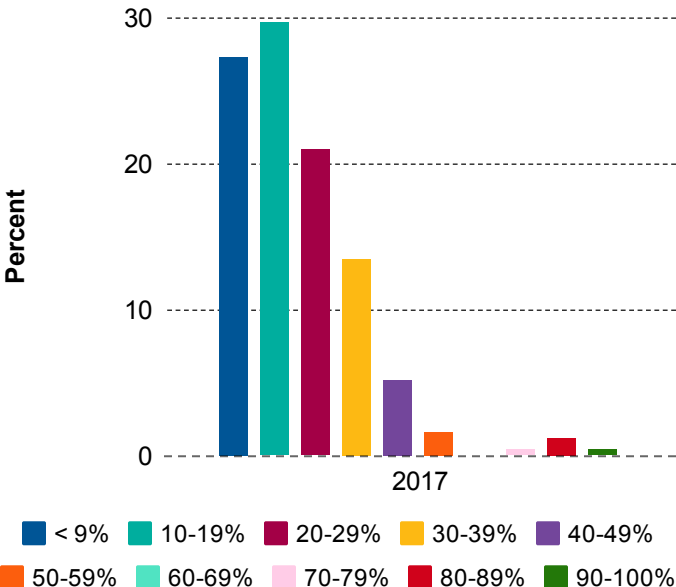
- Agency and Independent Not-For-Profit camps serve the most diverse camp population
- 25% of Agency camps and 37.6% of Independent Not-For-Profit camps reported their camper enrollment included 20% or more African American and Hispanic/Latino(a) campers

Camper Demographics: Income

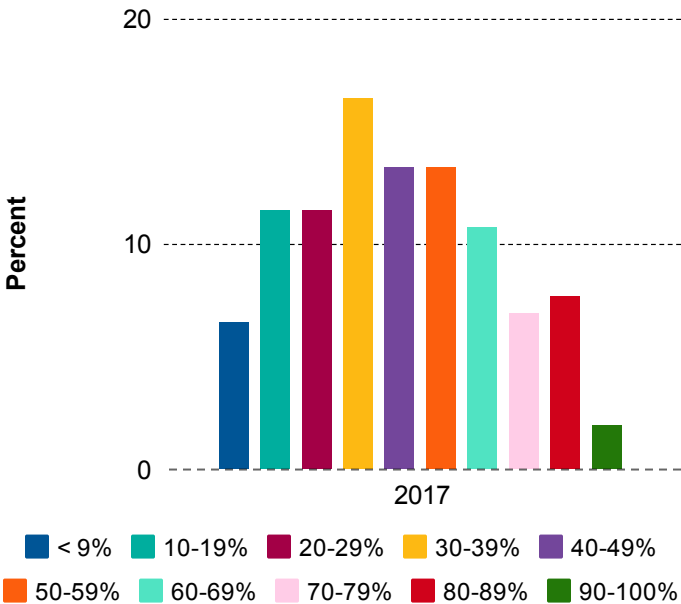
Poverty



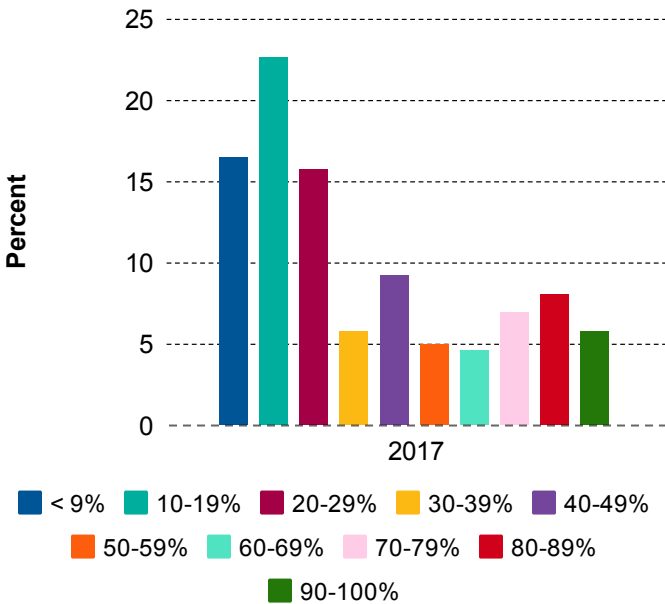
Low Income



Middle Income



High Income



Scholarships/Tuition Reduction

Scholarships/Tuition Reducing Fees by 50% +

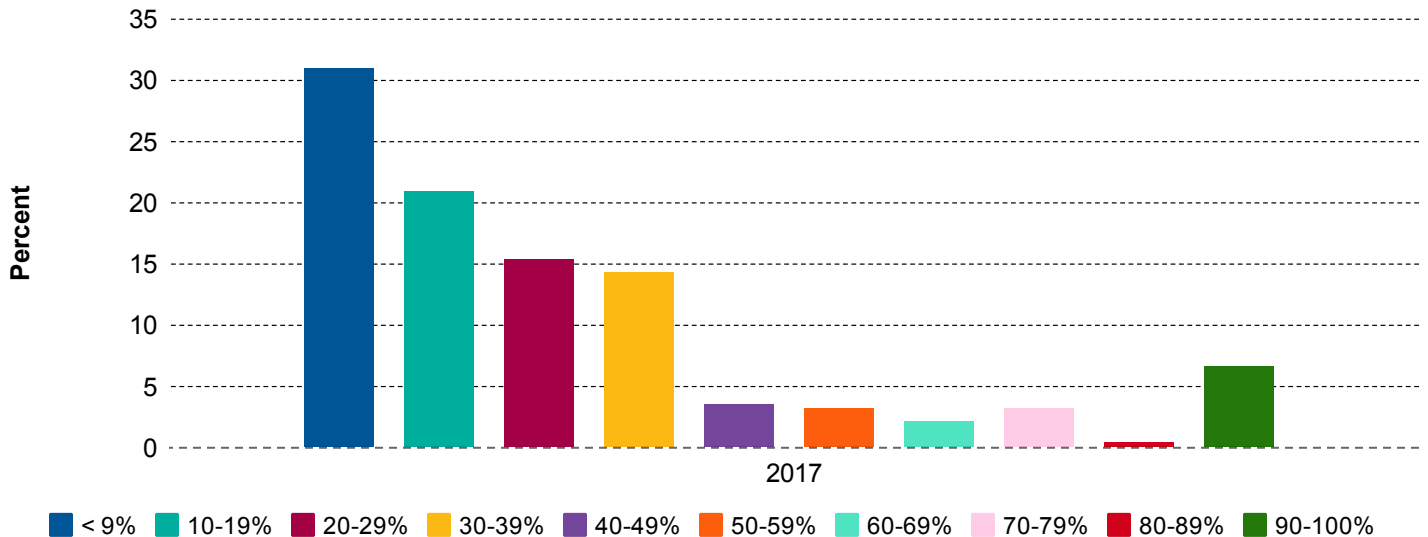


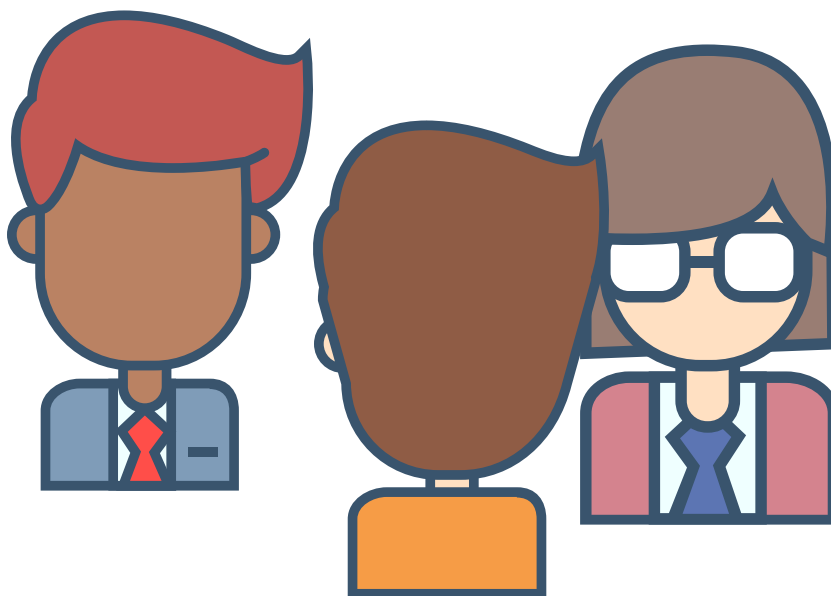
Chart visualizes the camps that offer discount to a percentage of campers

E.g. 6.6% of camps offer scholarships to 90-100% of campers

Open ended questions revealed:

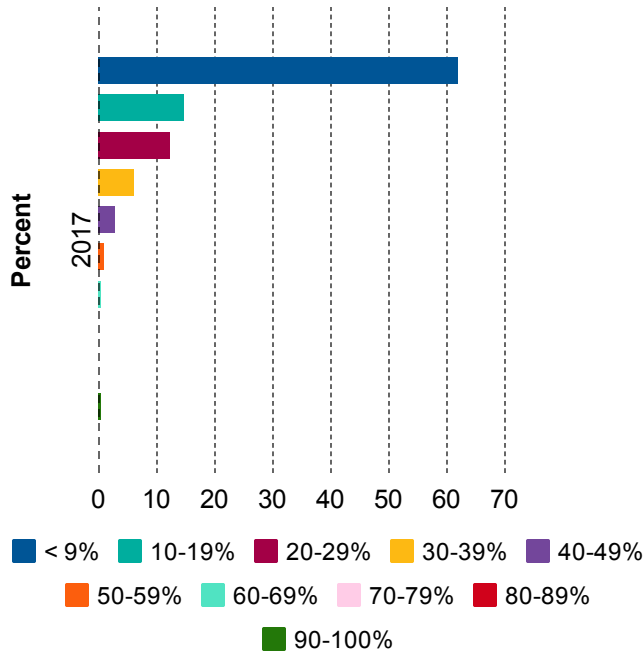
Camps reported offering more scholarships: 5

Camps reported receiving more requests for scholarships: 6

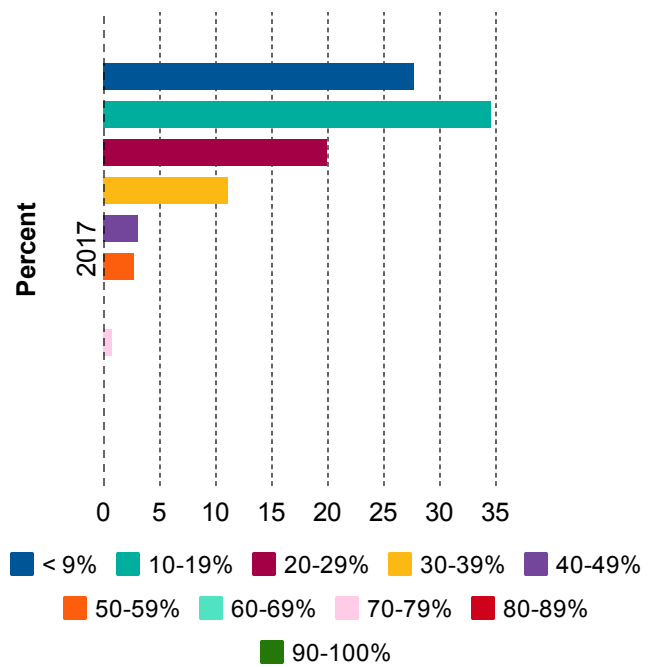


Camper Demographics: Age

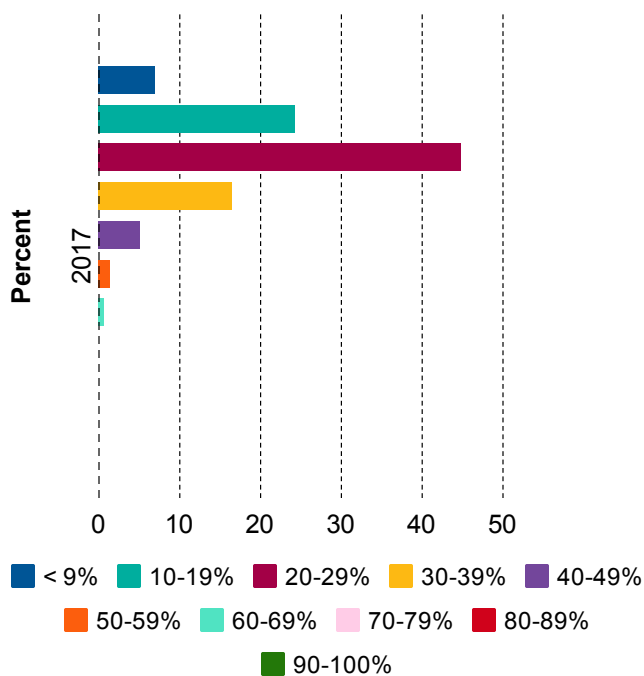
6 and Younger



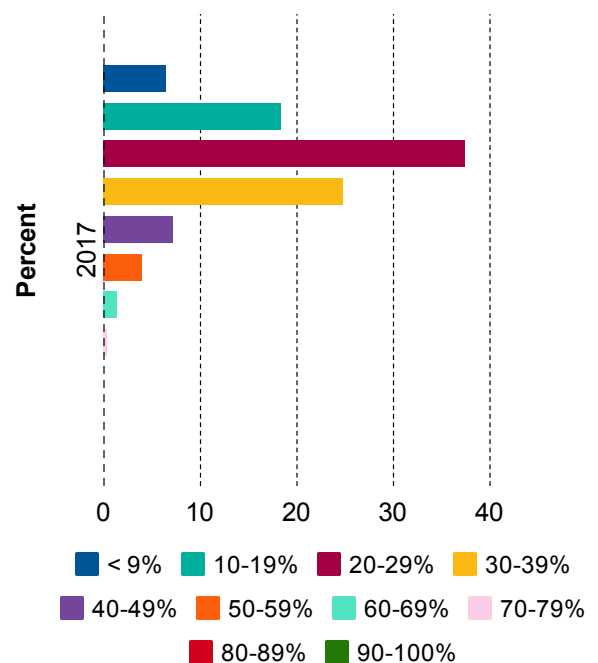
7-8 Year Olds



9-10 Year Olds

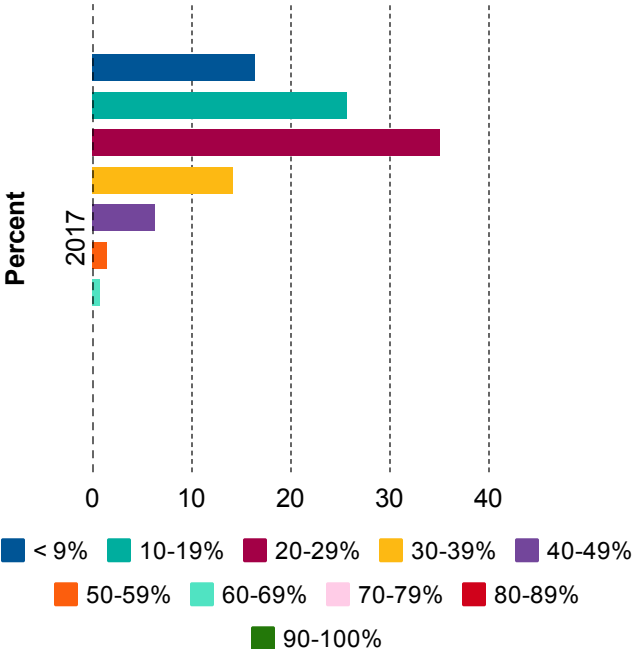


11-12 Year Olds

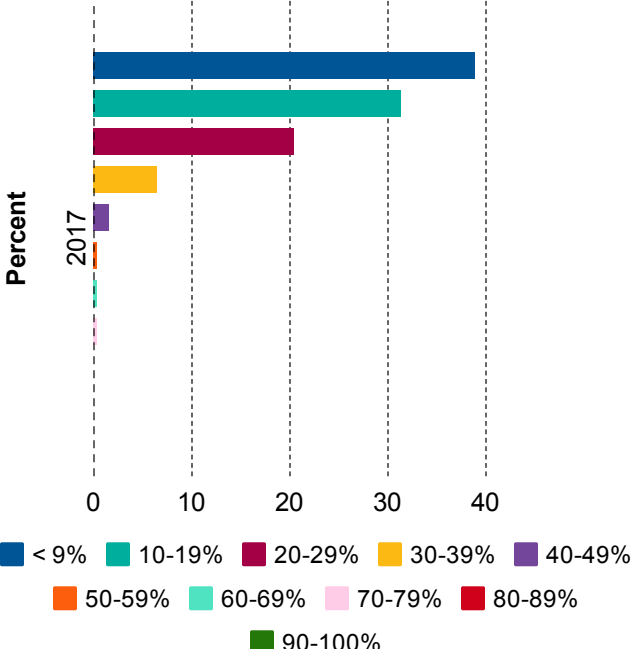


Camper Demographics: Age

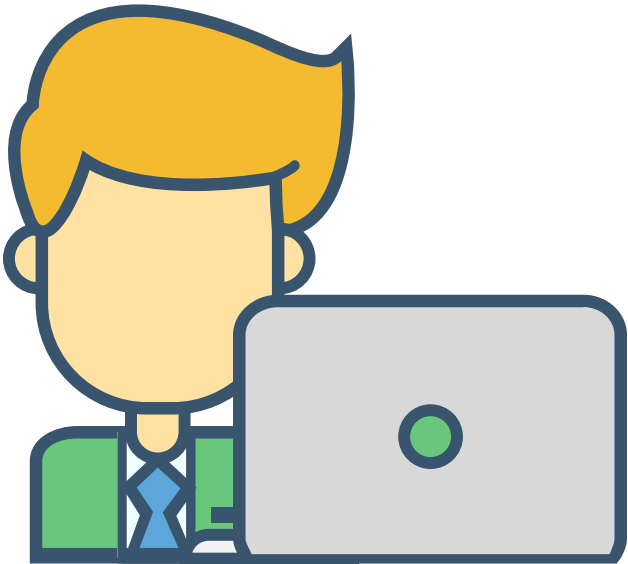
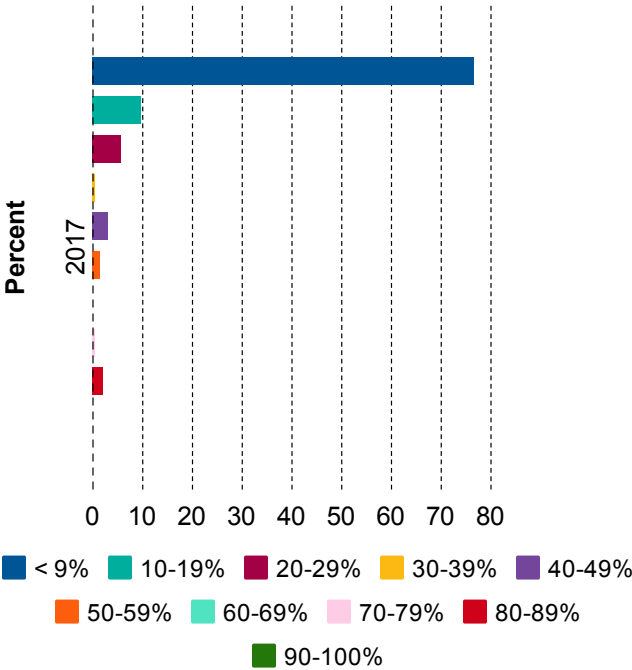
13-14 Year Olds



15-16 Year Olds

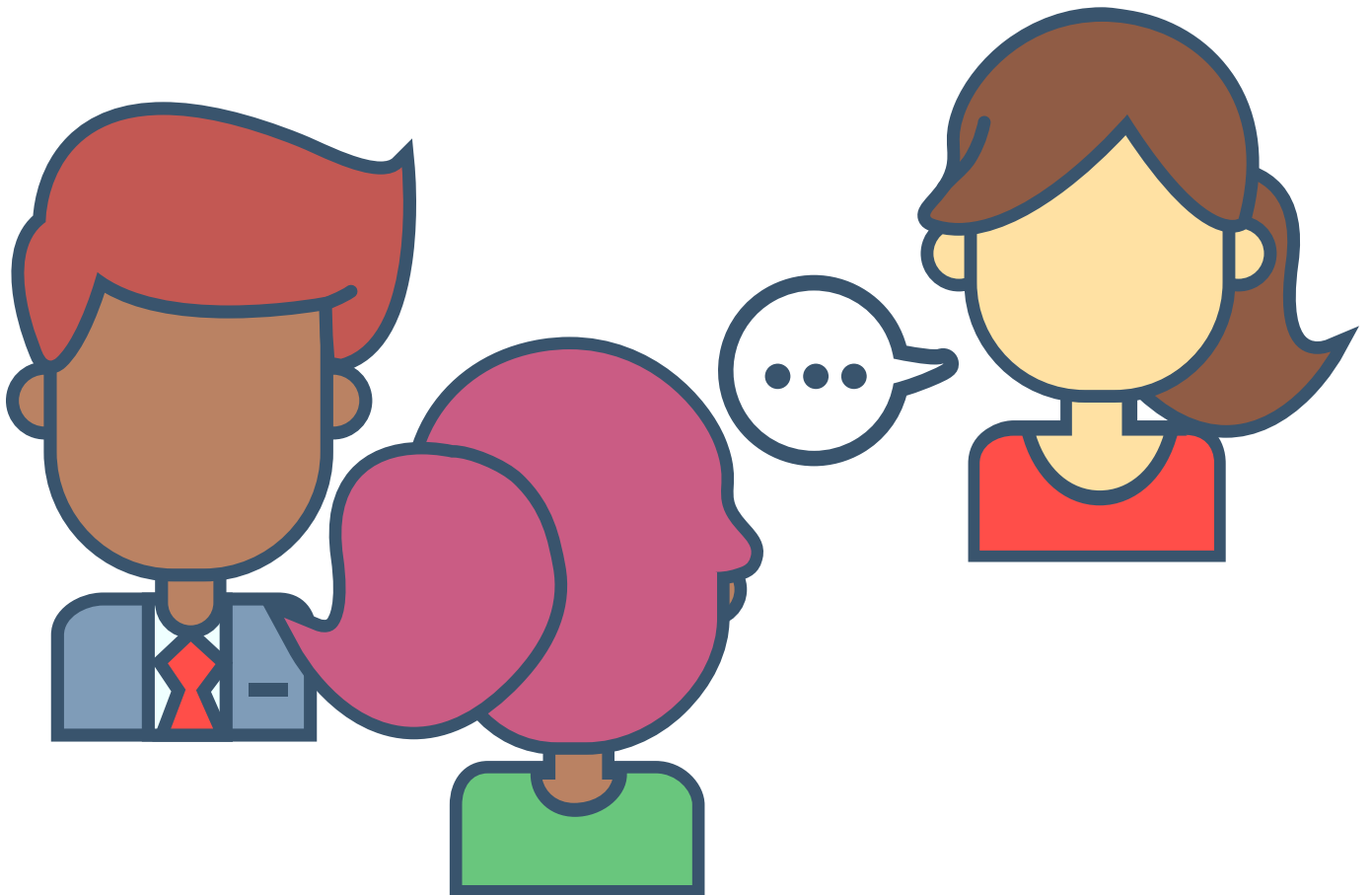


17 and Older



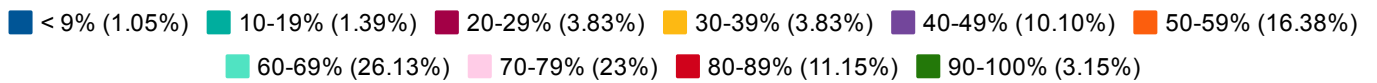
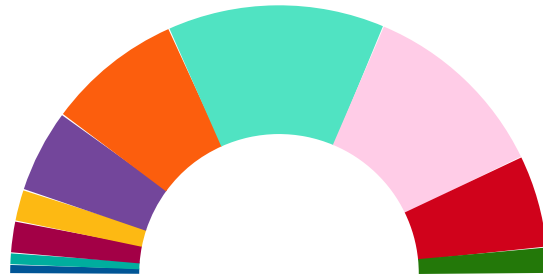
Camper Demographics: Takeaway Points

- Nearly a quarter of camps (23%) reported serving 10-19% Hispanic youth and 10-19% African American youth, while 70% of camps reported at least 7 in 10 campers were Caucasian
- More camp families are middle income households
- Camps are reporting both receiving more requests for, and offering more scholarships to campers to reduce fees for families
- Most popular camper age is 9-12 years old, with 25% of camps reporting 3 in 10 campers were 11-12 years old



Returning Campers

Returning Campers



80% of camps reported that over half of their campers were returners!



Campers with Special Needs

Categorization of Disabilities:

Physical/Motor: includes campers who use wheelchairs or walkers

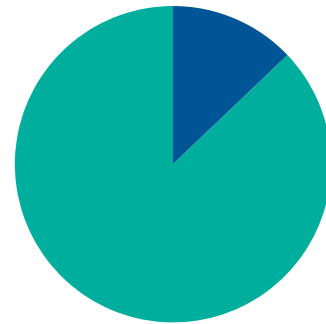
Sensory: visual and/or hearing impairments

Cognitive/Developmental: Learning disability, ADD, ADHD, Down Syndrome, Autism Spectrum Disorder

Psychological/Emotional: depression, anxiety, bereavement

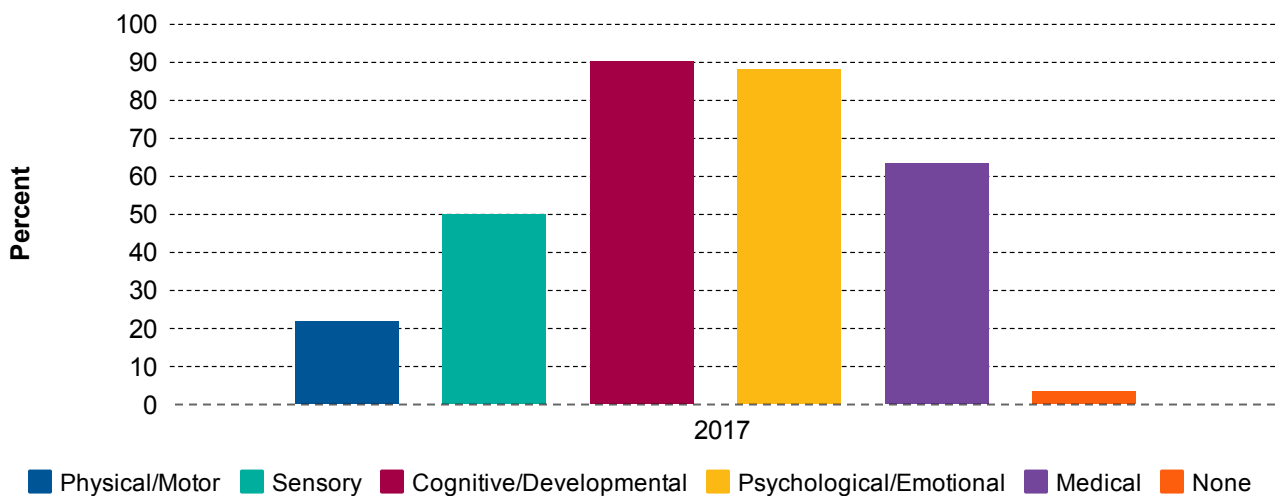
Medical: diabetes, cancer, burns

Primarily Serve Campers With Illness?



Yes (12.89%) No (87.11%)

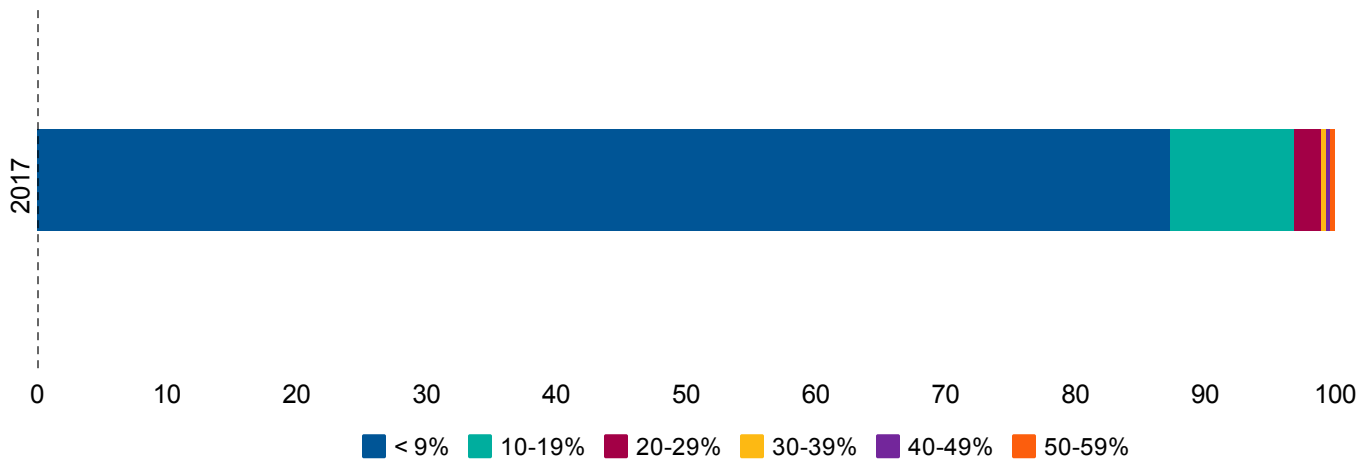
Type of Disability



Note: chart refers to percent of camps that serve at least one camper with disability, not percent of campers

International Campers

Percent of International Youth at Camp



Campers identified from 50 different countries!

Top five countries:

China

France

Spain

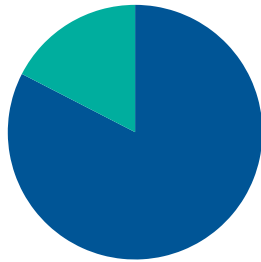
England

Mexico



CIT/LIT Programs

Offer a CIT/LIT Program?



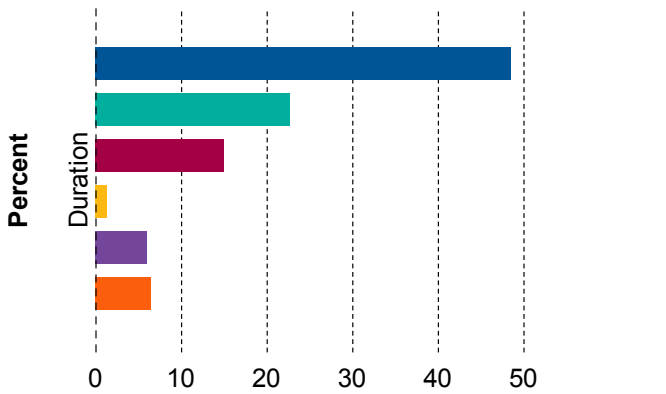
Yes (82.56%) No (17.44%)

Number of Campers in CIT/LIT Program



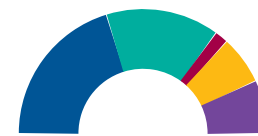
1-4 (12.34%) 5-9 (12.77%) 10-14 (17.02%)
 15-19 (9.79%) 20-29 (11.91%) 30-49 (16.17%)
 50+ (18.30%) No CIT/LIT Program (1.70%)

Duration of CIT/LIT Program



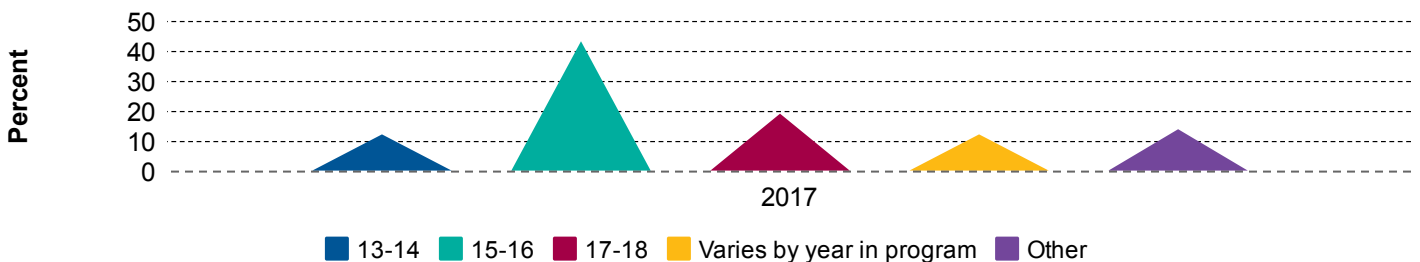
1-3 weeks 4-6 weeks 7-9 weeks 10-12 weeks
 Multiple years Other

CIT/LIT Program Funding



Pay Tuition for Camp Profit (40.43%)
 Pay Tuition for Basic Expenses (29.57%)
 Scholarship/Financial Aid (3.48%)
 Supported Through Other Means (12.61%)
 Other (13.91%)

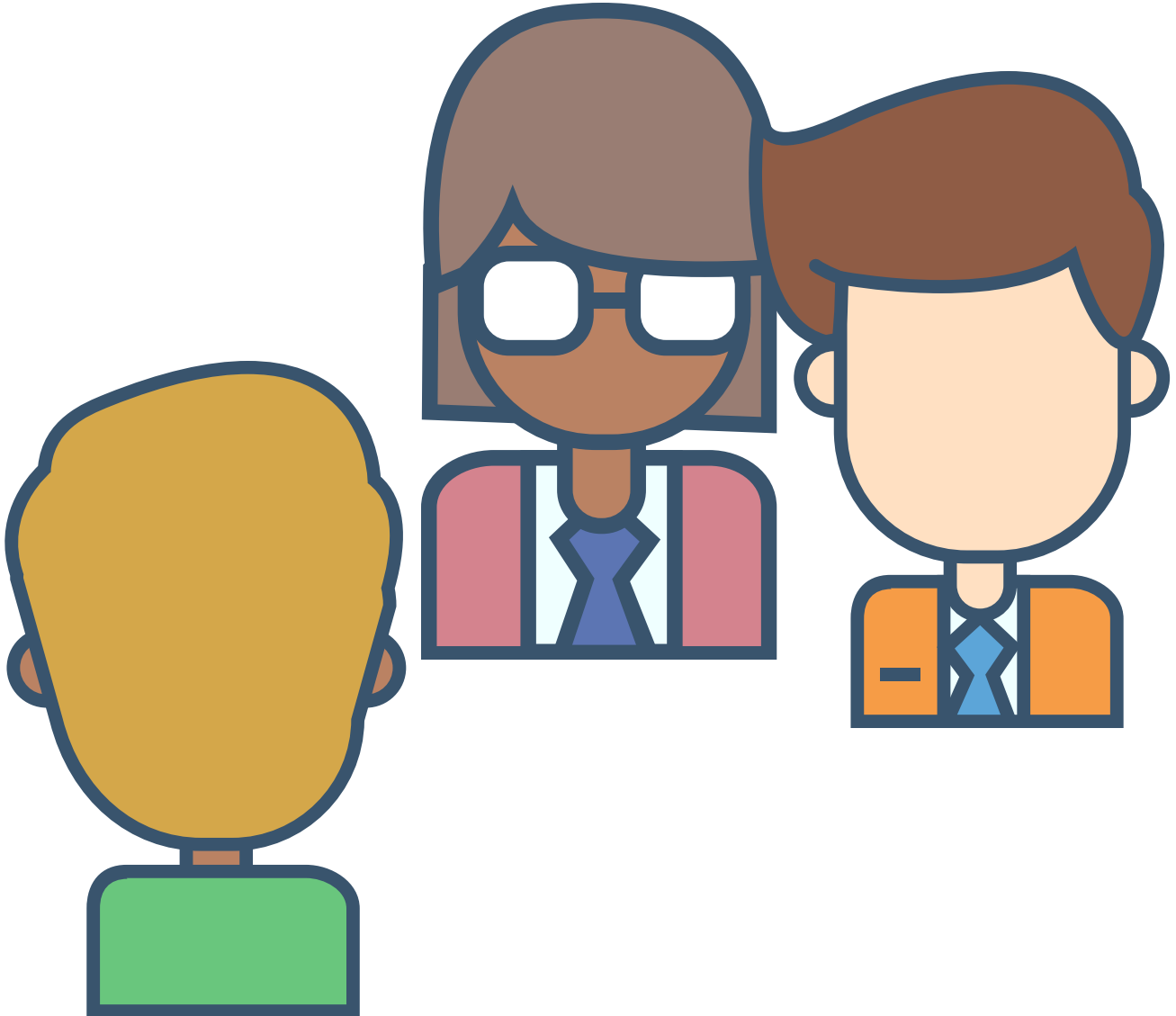
Age of CITs/LITs



13-14 15-16 17-18 Varies by year in program Other

CIT/LIT Programs: Takeaway Points

- Most camps (approximately 83%) offer a CIT/LIT program
- These programs look different for every camp as there is a wide distribution of the number of campers in the CIT/LIT program
- Nearly half (48.5%) of the programs are 1-3 weeks in length
- In 62% of camps, CITs/LITs are 15-18 years old
- 70% of camps require their CITs/LITs to pay for tuition (40% for profit, 30% to cover basic expenses)



Thank you from the ACA Research Team

Contact: Victoria Povilaitis | victoria.povilaitis@utah.edu

